



ADOA
Arizona Department of Administration



human resources information solution

"A World of Information for Arizona Employees"

I-9 EEO Training

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Using this Training Manual

When you attend HRIS Training, this manual will be used to outline the process. In the class you will learn specifics on how to process an individual action.

After training, additional resources can be found on the HRIS Website, including a link to Self Directed Help. This section of the training manual will provide an outline of the naming conventions and setup/flow of the training material.




Text Conventions

The manual is setup using standard text conventions and distinct visual elements to make training easier to follow.

Format	Meaning
Bold	Name of a Form/Field. A manual title. An emphasized word/phrase. A placeholder for a user-defined value.
<i>Italics</i>	A key name. For example, Shift and Enter are key names.

Visual Elements

Visual elements are provided for certain types of information to draw your attention to that element/concept. NOTE: Not all “elements” may be included in this manual.

Format	Meaning
	Tip – provides miscellaneous information about facts that might be of interest to you as you complete the process.
	Warning or Important Note – provides critical points or items that you must address as you complete the process.
	Exercise – indicates an Exercise.

Screen Captures

Screen Captures are provided prior to each Task Step Chart. The capture will identify the Form Name and Form Number according to the task. The numbers identified on the screen capture correspond to the numbered tasks in the chart.

Example:

The screenshot shows the HRIS State of Arizona EMPLOYEE US TAXES (PR13.1) form. The form is titled 'EMPLOYEE US TAXES (PR13.1)' and includes a 'Welcome,' message. It features a navigation bar with 'Go To', 'Preferences', and 'Help' links. The form is divided into sections for 'Company', 'Employee', 'Resident', 'Work', 'Workers Comp State', and 'EIC Status'. It also includes a table for 'FC Ded Description' with columns for 'Res', 'Sts', 'Exemp Number', 'Exempt Amount', 'Tax Ex', and 'Cert Code'. The form is annotated with numbered circles 1 through 7, indicating specific tasks or fields.

Task Step Chart

The Task Step Charts are set up to easily identify each necessary step taken with follow through explanation to make training easier to follow.

Format	Meaning
Number Column	This number identifies, on the screen capture, the order the steps are to be taken (in sequence)
HRIS FIELD	This identifies the field on the form that your action is required.
R/O	This will tell you if the field you are working on is a Required field or an Optional field.
Step/Action	This will identify what needs to be entered in the current field.
Expected Result	This will identify the result of your current action taken. If the task step chart is blank, make sure to always check the lower left hand corner of your screen for messages from HRIS.
Notes/Additional Information	This will identify Warning or Important Note – provides critical points or items that you must address as you complete the process.

HRIS Basics

HRIS has a number of standard features that work the same regardless of the field you are on in the system.

HRIS Forms

- HRIS Forms will always open with the fields blank.
- When navigating in HRIS, you can move from field to field by pressing the Tab button on your keyboard, or clicking your mouse in each new field.
- You must then type or select from a drop down menu the items you want to fill into your fields. If you transfer from another HRIS form, some of the data from the previous form (ex. Company and Employee EIN) will fill in those same data items on the new form.

Completing Fields on HRIS Forms

There are key fields, which are required on HRIS Forms.

- All information should be entered in CAPITAL LETTERS.

Name:

- Do not use punctuation.
- Address 1:
- Phone numbers are input with periods. (602.111.1111)
- Information is Added/Changed/Inquired on using the navigation bar. You can also use the buttons Next/Previous to move between Employee records.

HRIS System Messages

- Always check the bottom left corner of a form for system messages such as "Add Complete-Continue."
- HRIS has built in edits to validate information. For example:
 - The Social Security Number is checked by HRIS to see that it is in the correct format and it does not already exist.

Introduction

Part of the State of Arizona New Hire and Rehire process includes the completion and verification of Employee Work Eligibility.


All employees are required to fill out the Federal Immigration and Naturalization Form (I-9). In addition, the State of Arizona collects Equal Employment Opportunity (EEO) Information. These documents must be furnished within 3 days of hire (or 90 days under some circumstances).

I-9 and EEO information use to be collected and stored manually, but in the new HRIS system, this information will be stored electronically.

Information on I-9 and EEO will be input into the Individual Action Form (XP52.1) using the I-9 – EEO Action. This information is being input into HRIS to provide the ability for electronic report to the Federal Government.

The training manual will outline how to complete the electronic entry of I-9 and EEO information.

Individual Action (XP52.1)- Parameters Tab (I-9 - EEO)

 **INDIVIDUAL ACTION (XP52.1)** Welcome, [User]

XP52.1 Add Change Delete Fill Defaults **Inquire** Next Previous Reverse Action Go To Preferences Help

Home **Indivi...**

Data Directory

1) Company: 1
2) Employee: 92627
3) Action, Nbr: I-9 - EEO

Related Pages

Parameters 15
[Selected Items 1](#)
[Selected Items 2](#)
[Selected Items 3](#)


Company: 1 STATE OF ARIZONA
Employee: 92627 PRESLEY, ELVIS A.
Action, Nbr: I-9 - EEO 3 I-9/EEO UPDATE/CHANG
Effective: 01/02/2004 4
Reasons: I-9 DOC 5 Comments


Last Chg Date: 01/01/04
569-89-7894

Parameters


Main **Special Processing**

7 **Immediate:** y Yes
8 **Anticipated End:**
9 **Update Benefits:** y Yes
10 **Update Required Deductions:** y Yes
11 **Old Deduction End Date:**
12 **New Deduction Begin Date:**
13 **Occurrence Type:**
14 **Participant:** [Curr Calc](#)

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	Company Field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
2	Employee Field	R	Type the Employee's EIN.	Name will display next to the field after cursor is moved from the Employee field	You must enter the correct EIN.
3	Action Nbr Field	R	Type or use the Drop Down to enter action ' HIRE-REHIRE2 '.	Based on the Action Nbr. selected the system will populate Selected Items 1, 2, & 3 with the fields related to this action after clicking Inquire.	
4	Effective Field	R	Type the Effective Date of the action.	The Effective Date of the hire will be in this field.	Date is formatted as MMDDYY
5	Reasons Field First Box	R	Type or use the Drop Down to enter the reason code for the Hire Action.		One reason code is required.
	Reasons Field Second Box	O	Type or use the Drop Down to enter the 2 nd Reason Code for the Hire.		The 2 nd Reason Code is not required however it can be used to better define the reason for the Hire Action. It can be useful for reporting purposes.
6	Inquire Button	R	Click Inquire	You should get message "Inquiry Complete, add new values" in the lower left corner.	DO NOT CLICK Add at this point!
7	Immediate Field	R	Type Y in the Immediate Field.	The Action will process Immediately once the action is completed and added.	All new Hire Actions must be completed Immediately.
8	Anticipated End Field	R	Leave Blank	This field must be blank.	
9	Update Benefits Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	This will activate the benefits rules for the new hire. Don't worry if they are not eligible for benefits the system can determine that factor. It is easier to place a Y in this field.
10	Update Required Deductions Field	R	Type or Select from the Drop Down 'Y – Yes'.	This field must contain a Y.	This will activate the new hires required deductions.
11	Old Deduction End Date Field	R	Leave Blank	When the action is processed the system will default in the correct date.	
12	New Deduction Begin Date Field	R	Leave Blank	When the action is processed the system will default in the correct date.	

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
13	Occurrence Type Field	R	Leave Blank	This field must be blank.	Do not enter anything into this field.
14	Participant Field	R	Leave Blank	This field must be blank	Do not enter anything into this field.
15	Selected Items 1	R	Click on the Selected Items 1 tab located under Related Pages on the left menu pane.	The Selected Items 1 section will appear with the necessary field to be populated.	

Individual Action (XP52.1)- Selected Items 1 Tab (I-9 - EEO)



INDIVIDUAL ACTION (XP52.1)

Welcome, .
Go To Preferences Help

XP52.1
Add Change Delete Fill Defaults Inquire Next Previous Reverse Action

Home Indivi...

Data Directory

- 1) Company: 1
- 2) Employee: 92627
- 3) Action, Nbr: I-9 - EEO

Related Pages

- Parameters
- Selected Items 1**
- Selected Items 2
- Selected Items 3

Company: 1
Employee: 92627
Action, Nbr: I-9 - EEO
Effective: 01/02/2004

STATE OF ARIZONA
PRESLEY, ELVIS A.
I-9/EEO UPDATE/CHANG


Last Chg Date: 01/01/04
569-89-7894


Reasons: I-9 DOC
Comments

Selected Items 1

Data Item	Current Value	Change To
Document 1 Type		
Document 1 Desc		
Document 1 Number		
Document 1 Exp Date		
Document 2 Type		
Document 2 Desc		
Document 2 Number		
Document 2 Exp Date		
Eligibility Status		
Alien Number		
Status Expiration Dt		
Admission Number		

Inquiry complete, add new values
Internet

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	Company field Employee Field Action, Nbr Field Requisition Field Effective Date Field Reasons Fields	R R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
2	Document 1 Type Field	R	Type or use the drop down to select the appropriate Document 1 type.		Note: When you add information for Document 1 Type and Document 2 Type follow the requirements on the paper I-9 form. <ul style="list-style-type: none"> • For Document Type from List A use 'IDEMPL' from the drop down, • For Document Type from List B use 'ID' from the drop down, and/or • For Document Type from List C use 'EMPLELIG' from the drop down.
3	Document 1 Desc Field	R	Type or use the drop down to select the appropriate Document 1 Desc		
4	Document 1 Number Field	R	Type the Document 1 Number		
5	Document 1 Exp Date Field	R	Type the Document 1 Exp Date.		Date Format: MMDDYYYY
6	Document 2 Type Field	R / O	Type or use the drop down to select the appropriate Document 2 Type if needed.		Note: When you add information for Document 1 Type and Document 2 Type follow the requirements on the paper I-9 form. <ul style="list-style-type: none"> • For Document Type from List A use 'IDEMPL' from the drop down, • For Document Type from List B use 'ID' from the drop down, and/or • For Document Type from List C use 'EMPLELIG' from the drop down.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
7	Document 2 Desc Field	R	Type or use the drop down to select the appropriate Document 2 Desc if needed.		
8	Document 2 Number Field	R	Type the Document 2 Number if needed.		
9	Document 2 Exp Date Field	R	Type the Document 2 Exp Date if needed.		Date Format: MMDDYYYY
10	Eligibility Status Field	O	Type or use the drop down to select the appropriate Eligibility Status.		
11	Alien Number Field	O	Type the Alien Number if needed.		
12	Status Expiration Dt Field	O	Type the Status Expiration Date if needed.		Date Format: MMDDYYYY
13	Admission Number Field	O	Type the Admission Number if needed.		
14	Selected Items 2	R	Click on the Selected Items 1 tab located under Related Pages on the left menu pane.	The Selected Items 1 section will appear with the necessary field to be populated.	Information that was imported from PA31.1 will appear.

Individual Action (XP52.1)- Selected Items 2 Tab (I-9 - EEO)

HRIS State of Arizona **INDIVIDUAL ACTION (XP52.1)** **Welcome,**

Go To Preferences Help

XP52.1 **6** Add Change Delete Fill Defaults Inquire Next Previous Reverse Action

Home Indivi...

Data Directory

1) Company: 1
2) Employee: 92627
3) Action, Nbr: I-9 - EEO

Related Pages

Parameters
Selected Items 1
Selected Items 2
Selected Items 3
Selected Items 2


1 { Company: 1 STATE OF ARIZONA
Employee: 92627 PRESLEY, ELVIS A.
Action, Nbr: I-9 - EEO I-9/EEO UPDATE/CHANG
Effective: 01/02/2004
Reasons: I-9 DOC
Last Chg Date: 01/01/04
569-89-7894
[Comments](#)

Selected Items 2

Data Item	Current Value	Change To
Authorization		V
EEO-4 Group		V
Ethnicity 4		V
Exclude From EEO-4 5		V
		V
		V
		V
		V
		V
		V
		V
		V
		V
		V
		V

Inquiry complete, add new values

Internet

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	Company field Employee Field Action, Nbr Field Requisition Field Effective Date Field Reasons Fields	R R R R R R	No Action Required, these fields will default to what was entered on the Parameters Tab.		
2	Authorization Field	O	Type Authorization number if applicable.		
3	EEO-4 Group Field	R	Type the EEO-4 Functional Group for your agency		Valid Values are 01, 02, 03, 04, 06, 08, 09, 10, 11, 12, 14, 15 or 99 (Elected Officials ONLY). See the EEO-4 Function Groups Document to find the one in which you agency is located.
4	Ethnicity Field	R	This will default in from previously processed actions if entered. If Current Value field is blank, Type Ethnicity in Change To field.		
5	Exclude from EEO-4 Field	R	Type 'Y' or 'N' as applicable to the Employee.		All Employees should be 'N', except for those list in the EEO-4 Group 99.
6	Add button	R	Click Add to process the action	You will receive a message in the lower left corner "Warning! Action will be immediate; press OK to continue.	There is not an OK tab to click. See next step.
	Add button	R	Click Add Again	Message in lower left corner "Action processed; deductions updated; continue".	The action has now processed and a Personnel Action Comments form (PA56.1) should appear. It is not recommended, however you can make comments on this form. You must be very careful what you say and how it is worded if you use it. This is the Official Employee Personnel file. Note: The Selected Items 3 tab is blank in this Action. No Action is required on this tab.

Personnel Action Comments (PA56.1)

HRIS State of Arizona

PERSONNEL ACTION COMMENTS (PA56.1)

Welcome, Jene't I

Go To Preferences Help

XP52.1 2

Close Detach Add Change Delete Inquire Insert PageDown

Home Person...

FC	Comments	Print

1	Add or Close	R	<p>If you choose to make comments, type them in and Click Add.</p> <p>If you do not make comments, Click Close</p>	<p>You will see a message in the lower left corner "Done".</p>	<p>Action will be processed and Employee's record will be updated.</p> <p>If you are adding a comment, you must place a value in the FC field, and type your comment in the Comment Field BEFORE clicking 'Add'</p>
2	White Search Box	R	<p>Type the next form number in the New Hire or Rehire Process.</p> <p>Press Enter on the keyboard</p>	<p>The HRIS Form will open.</p>	<p>You may continue with the New Hire or Rehire Process as described in those Training Manuals.</p>